



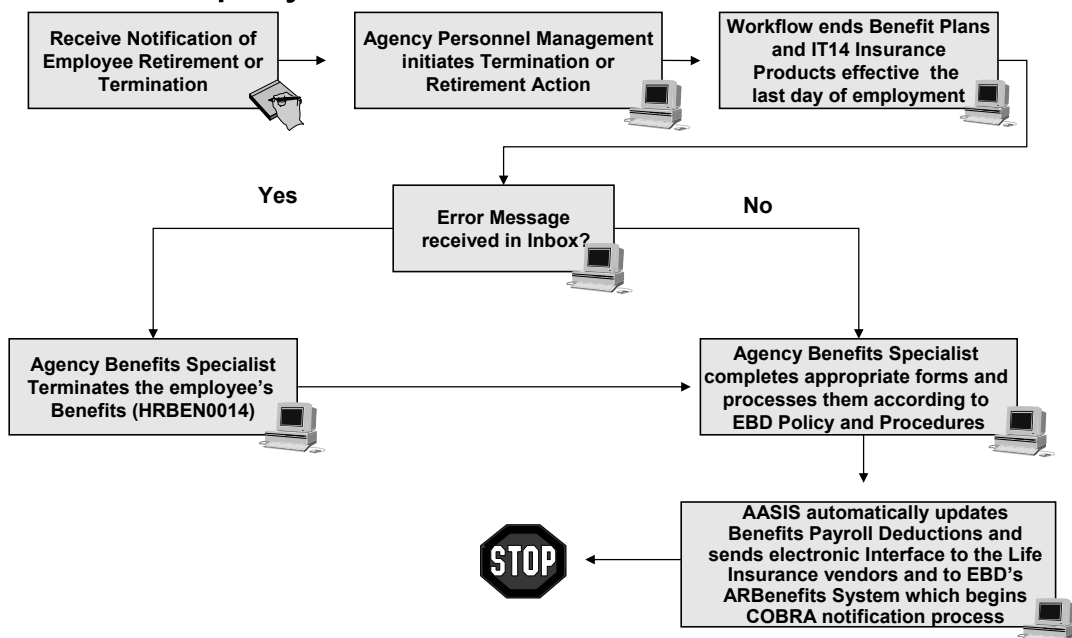
# **HRBEN BENEFITS ADMINISTRATION**

## **Chapter 13 – Manually Terminate Benefits**

Following a Termination or Retirement action in PA40, all Benefit plans and Recurring deductions are ended using the last day worked. (One day earlier than begin date of Termination or Retirement action.)



## Employee Termination Task Flow



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When terminating an employee, all Benefits are automatically ended from the effective date of the Personnel Action Termination or Retirement. No further action is necessary by the Benefits Specialist.

However, if an employee's record is open in transaction PA30 or PA40 during the Termination process, the system will not terminate the employee's Benefits. This will generate an error indicating the employee's record could not be updated.

If an error occurs, AASIS generates a Workflow message to the Benefits Administrator and a manual termination will have to be performed in order to end the employee's Benefits.

Agencies should check to make sure **all Plans have an end date** once the process has been completed.

**Note:** Viewing the record through Transaction PA20 does not affect the automatic termination of Benefits process.

## **Exercise** Scenario #13

- You just received an SAP Inbox Message that an error occurred in the Automated Termination process. Manually terminate the Employee's Benefit Elections.



The Benefits Administrator named on the Organizational Management infotype will receive a workflow message if the Automatic Benefit Termination cannot occur, usually due to the record being 'left open' after the action is completed. Left Open is when an employee's record is in use and cannot be accessed by others. Make sure that when a record is not in use that you back completely out to the Main menu.



## Demonstration

- Terminate Benefit Coverage

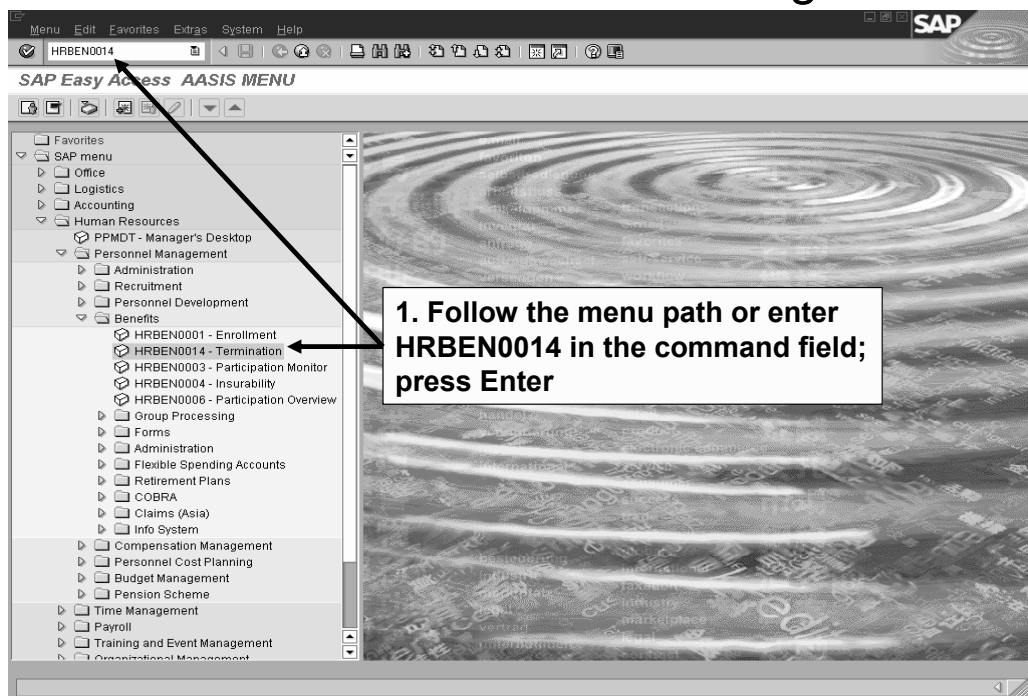
Human Resources > Personnel Management >  
Benefits > Termination  
(**HRBEN0014**)



**Note:** Before this transaction is processed, you **MUST** be sure that the person with the role of Personnel Management has processed the Termination action in AASIS. Otherwise, your transaction (HRBEN0014) will not process properly.



# Terminate Benefit Coverage





# Terminate Benefit Coverage

The screenshot shows the SAP 'Termination of Plan Participation' screen. The title bar includes 'Termination Edit Goto SAP'. The main area has a left sidebar with 'Direct selection' and 'Selection' tabs. Under 'Selection', the 'Personnel no.' field contains '20'. Below this is an 'ID number' field and a 'Select' button. A table lists personnel with columns 'Pers.No.' and 'Name', showing '20 Susan Vollman'. The main right pane has a date field set to '07/19/2004' and buttons for 'Display plan', 'Error list', and 'Overview'. Annotations with arrows point to: 1. The 'Continue' button in the top left. 2. The 'Personnel no.' field. 3. The date field.

4. Click to Continue

2. Enter personnel number

3. Click to change the date to the last day of employment.

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**Note:** The effective date will be the employee's last active day worked or the last day the employee is on payroll.



# Terminate Benefit Coverage

The screenshot shows the SAP 'Termination of Plan Participation' screen. The 'Termination for' section is set to 'Susan Vo11man' on '07/31/2004'. The 'Stop participation' button is highlighted. Below it, a table lists the plans to be terminated:

	Validity period	Action	Date
<input type="checkbox"/> Medical			
<input type="checkbox"/> Basic Life			
<input type="checkbox"/> Optional Life			
<input type="checkbox"/> Opt Life Post			

A note box with an arrow pointing to the 'Medical' row states: **Note:** Click to expand, if necessary, to verify Plans.

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Each Plan-type will open to show individual plans enrolled.  
Click in the boxes to the left of each Plan to view if necessary.



# Terminate Benefit Coverage

Termination Edit Goto System Help

Termination of Plan Participation

Direct selection Selection set

Personnel no. [ ]

ID number [ ]

Select

Pers.No. Name

20 Susan Voilman

Termination for

Name Susan Voilman on 07/31/2004 Overview

Stop participation Display plan Validity period Action Error list

Plan	Validity period	Action	Date
<input checked="" type="checkbox"/> Medical	10/01/2003 - 12/31/9999	Terminate on	07/31/2004
<input checked="" type="checkbox"/> QualChoice HMO	10/01/2003 - 12/31/9999	Terminate on	07/31/2004
<input checked="" type="checkbox"/> Basic Life	10/01/2003 - 12/31/9999	Terminate on	07/31/2004
<input checked="" type="checkbox"/> US Able (Basic EE Life ASE	10/01/2003 - 12/31/9999	Terminate on	07/31/2004
<input checked="" type="checkbox"/> Optional Life	10/01/2003 - 12/31/9999	Terminate on	07/31/2004
<input checked="" type="checkbox"/> US Able-Opt EE Life ASE 1X2X	10/01/2003 - 12/31/9999	Terminate on	07/31/2004
<input checked="" type="checkbox"/> Opt. Life Post	10/01/2003 - 12/31/9999	Terminate on	07/31/2004

5. Click in the boxes to terminate individual Plans or select 'All' by clicking the box shown

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To terminate individual Benefits Elections for an employee, click on the box to the left of the Benefits Election to be terminated.

The 'ALL' button will allow you to select all benefits listed. **Do not use 'Select All' unless termination dates are the same for all Plans.**

**Note: For Medical and Dependent Spending accounts, end date must be the last day of the pay period, rather than the actual last day of work.**

For Medical/Dependent Flexible Spending Account Plans, the system will terminate along with other Benefits. However, if error is received, it must be terminated manually by using the last day of the pay period as the end date rather than the working day for the employee.





# Terminate Benefit Coverage

Termination Edit Qoto System Help

Termination of Plan Participation

Termination for  
Name Susan Vollman on 07/31/2004 Overview

Stop participation Display plan Error list

	Validity period	Action	Date
<input checked="" type="checkbox"/> Medical			
QualChoice HMO	10/01/2003 - 12/31/9999	Terminate on	07/31/2004
<input checked="" type="checkbox"/> Basic Life			
US Able (Basic EE Life ASE)	10/01/2003 - 12/31/9999	Terminate on	07/31/2004
<input checked="" type="checkbox"/> Optional Life			
US Able Opt EE Life ASE 1X/2X	10/01/2003 - 12/31/9999	Terminate on	07/31/2004
<input checked="" type="checkbox"/> Opt. Life Post			

6. Click to Stop participation



# Terminate Benefit Coverage

Termination Edit Data System Help

Termination of Plan Participation

Termination for  
Name Susan Voilman on 07/31/2004 Overview

Stop participation Display plan Error list

	Validity period	Action	Date
<input checked="" type="checkbox"/> Medical	10/01/2003 - 12/31/9999	Terminate on	07/31/2004
<input checked="" type="checkbox"/> QualChoice HMO			
<input checked="" type="checkbox"/> Basic Life	10/01/2003 - 12/31/9999	Terminate on	07/31/2004
<input checked="" type="checkbox"/> US Able (Basic EE Life ASE)			
<input checked="" type="checkbox"/> Optional Life	10/01/2003 - 12/31/9999	Terminate on	07/31/2004
<input checked="" type="checkbox"/> US Able-Opt EE Life ASE 1X/2X			
<input checked="" type="checkbox"/> Opt. Life Post			

Plan type  
Medical  
Basic Life  
Optional Life  
Opt. Life Post

Stop participation

**Note:** Pop-up box appears to allow you to verify benefits being terminated.

**7. Click Stop participation**



# Terminate Benefit Coverage

Termination Edit Goto System Help

Termination of Plan Participation

Direct selection Selection set Termination for

Name Susan Vollman on 07/31/2004 Overview

Termination of Plan Participation

For 4 of 4 plan types, plans have been delimited or deleted

31/9999 Terminate on 07/31/2004

31/9999 Terminate on 07/31/2004

31/9999 Terminate on 07/31/2004

**8. Message appears that Plans have been delimited/deleted. Click the green check mark to complete the transaction.**



# Terminate Benefit Coverage

Termination Edit Goto System Help

Termination of Plan Participation

11. Click to Exit

Direct selection Select

Personnel no. [ ]

ID number [ ]

Select

Pers.No. Name

20 Susan Vollman

Name Susan Vollman on 07/31/2004 Overview

Stop participation Display plan Error list

	Validity period	Action	Date
Medical			
QualChoice HMO	10/01/2003 - 07/31/2004	Terminate on	07/31/2004
Basic Life			
US Able (Basic EE Life ASE)	10/01/2003 - 07/31/2004	Terminate on	07/31/2004
Optional Life			
US Able-Opt EE Life ASE 1X2X	10/01/2003 - 07/31/2004	Terminate on	07/31/2004
Opt Life Post			



## Questions and Answers

